**There are a few big changes as a result of USM SaaS:**

* Co-terminant deals, based on USM SaaS Anniversary Date
* Changes to Quoting Tool will be needed to accommodate above.
* Fulfillment of Sensors will be substantially different than today.  We’re really managing “Allowable Number of Sensors” on controllers.
* Opps will be approximate amounts.  Actual to-be-billed amounts will be based on Fulfillment Date

**Monday, June 20, 2016**

**USM SaaS Provisioning**

* Lee, Alex, Chris, Ron, Mark, Kyle
* Topic - what kind of License provisioning will be done for Trial and for regular Fulfillment
* Use Cases:
  + 14-day Trial
  + 14-day Trial gets extended
  + 14-day Trial becomes a Paying Subscriber
  + Paying Subscriber w/o Trial
  + User adds sensors midway thru subscription
  + User reduces sensors at subscription renewal
* Components:
  + Main Controller Node - resides in Cloud in AV-hosted envt, not actually downloaded.  During Trial, this node becomes provisioned and activated when user connects the first sensor node to it.  Only 1 Main Controller Node in an instance
  + “Sub-controller Nodes” - headless control nodes that hang off the Main Controller node.  Resides in Cloud in AV-hosted envt, not actually downloaded.  Zero to many Sub-Controller Nodes in an instance. I’m not sure if these get a different LIcense+Key than the Main COntroller Node.
  + Sensor Nodes - One to many sensor nodes in an instance.  Initially, only virtual sensors, no hardware.
* License:
  + License - similar to a serial number, I think.  Each Controller Node gets a unique License Key.
  + Key - to activate the License
  + A License+Key will exist for each Controller. It will indicate:
    - Allowable Number of Sensors.  The changing qty needs to be tracked.
    - Current expiration of the
* USM SaaS Anniversary Date - all SaaS deals will be co-terminant to an Anniversary date.  Sounds like may be a big change for Sales.
  + I \*think\* this means the actual amount of the Opp is dependent on the date Fulfilled.  OR, perhaps the Opp and Invoice will differ?
  + This is a HUGE impact to bookings
  + What is the Delivery Date for Sensors (change to “Allowable number of sensors”) to determine the Amount-to-be-billed?
* Appliances (in SFDC):
  + DIfferent from V5: Sounds like Controllers will have “Allowable Number of Sensors.”  This number could change as Subscriber adds (or reduces) sensors.
  + There won’t be a provisioned LIcense or Key for sensors
  + Controllers - will need to include the License and Key
  + Sensors - probably need to indicate which Controller it belongs to.
* Product Trial:
  + There will be new criteria for who can have a Trial - roughly, US/Canada/UK, business email address.  Exclude competitor email domains.
    - We’ll need to decide how to handle non-qualified folks.  Messaging.
    - We’ll need to allow reps to allow other folks to have a trial - exception basis.
  + Regform - similar to today.  “Look for an email to your inbox with License Key and instructions”
  + We’ll make a call to Alex’s License Server and get a License UUID and a Key.
  + We’ll provision an Appliance for a Controller Node:
    - Allowable Number Sensors = 1
    - Type = Trial
    - Expiry = +14 days
    - (It’ll hang off a LEAD - but it’ll need to follow the Lead when he gets converted to a CONTACT.  This will be tricky.)
  + We’ll send an email to the Lead with License + Key and instructions and Allowable Number Sensors
  + We’ll need to retain the License + Key in case we need to re-send.
* Quoting:
  + Big changes here.
  + We’d need ability to calculate Term based on USM SaaS Anniversary date (new Field).  For new USM SaaS customers, we’d use an approximate date
* Questions:
  + Actual Invoice Amounts will presumably differ from Opp Amounts because of Fulfillment dates.
  + What is the Fulfillment Event that initiates the billing and revenue recognition?  For expansion, I think some communication to Customer is needed, or a new License
  + Any changes to T&C to accommodate:
    - Subscription
    - Hosting in our envt - their data
  + What statements regarding data privacy, PII, data ownership, data backup, inherent risk of breach